Sage Enterprise Intelligence

SUCCESS STORY

How Aztec Hydraulics Unified Sales, Service, and Inventory with Real-Time Insights

Sage Tech Partner

CUSTOMER

INDUSTRY

Heavy Equipment

LOCATION

Mississauga,
Ontario

SYSTEMS

Sage 300
Sage Enterprise
Intelligence

Aztec Hydraulics is a leading provider of hydraulic solutions, specializing in both new parts sales and repair services for hydraulic cylinders, pumps, motors, and fluid power components. Aztec supports a variety of industries, including construction and material handling.

With a dynamic mix of walk-in business and online orders via their Shopify-powered store, Aztec Hydraulics prides itself on service speed, operational accuracy, and deep product knowledge.

Limited Visibility and Manual Processes

Before implementing Sage Enterprise Intelligence (SEI), Aztec Hydraulics faced significant reporting challenges. Much of the business-critical data lived in two separate systems—Sage 300 and Technisoft Service Manager—making it nearly impossible to obtain a holistic view of operations without time-consuming manual intervention.

"Prior to SEI, a lot of the reporting was manual. We were dumping it out into Excel spreadsheets."

KYLE BARRETTE
GENERAL MANAGER
AZTEC HYDRAULICS

With roughly 75% of operations running through Technisoft Service Manager, the team struggled to track inventory movements accurately. Sage's native reports only captured data from its own modules, forcing staff to rely on Crystal Reports and manual spreadsheets to understand true product usage.

Integration and Real-Time Insight

The turning point came when Aztec Hydraulics evaluated its options for analytics tools that could report on all its data sources. Their partner, BAASS, first identified the company's need for better reporting and introduced SEI as a solution. SEI won out thanks to its built-in support for Sage 300 and Technisoft data, and its ability to consolidate information from both service and sales divisions.

"We wanted to bring in data from both areas of our business—sales and service —and SEI gave us that."

KYLE BARRETTE
GENERAL MANAGER
AZTEC HYDRAULICS

Their team quickly began tailoring reports using standard Technisoft views and building custom dashboards to reflect their operational needs across seven divisions.

Transforming Reporting with SEI

1. Automated, Real-Time Reporting

SEI now plays a central role in daily operations. Monthly reports across seven divisions are automatically generated and distributed—no manual effort required. The executive team gains access to up-to-the-minute business insights that inform decision-making at all levels.

"Now we have a full picture of the usage and product in our system and how we're consuming it."

KYLE BARRETTE
GENERAL MANAGER
AZTEC HYDRAULICS

2. Live Dashboards Connecting Teams

A major efficiency gain has come from SEI dashboards installed on 50-inch screens in both the sales office and the warehouse. Previously, when a sales order was created, someone had to manually print the picking slip and physically walk it to the warehouse. There was no built-in way for the warehouse to know when orders were ready.

As soon as a sales order is created, it appears on the warehouse dashboard in real-time. Orders are automatically prioritized—rush orders, for example, appear highlighted, allowing the team to manage fulfillment with precision. "They can see when orders stack up—it's not a surprise anymore. They know there are 15 orders to pick, not just 2," said Kyle.

"This level of visibility and automation has drastically reduced delays, eliminated manual handovers, and increased order accuracy and speed."

KYLE BARRETTE
GENERAL MANAGER
AZTEC HYDRAULICS

3. Enhanced Inventory Management

SEI is also used to manage inventory at a much deeper level. For example, kits built from subcomponents are tracked live.

A custom dashboard checks component stock levels against min/max thresholds, ensuring the team knows how many full kits can be built at any time, even if those kits aren't currently assembled.

This approach allows Aztec to stock components instead of full kits, saving storage space and cost. "We now know, based on our component stock, how many kits we can build—and SEI tells us which kits are ready to go," said Kyle.

4. Seamless E-Commerce Integration

Another significant benefit has been the automation of inventory updates between SEI and Aztec Hydraulics' Shopify store. Previously, it took 20–30 minutes daily to manually export and upload spreadsheets, and because it was so time-consuming, it was only done monthly.

Now, SEI exports an updated inventory file every day, and a Shopify plugin automatically imports the file, so no manual work is required. "We went from updating Shopify once a month to daily updates. It's fully automated," said Kyle.

"We saw a 200% increase in e-commerce sales due to better product visibility and inventory accuracy online."

KYLE BARRETTE
GENERAL MANAGER
AZTEC HYDRAULICS

5. Cost-Effective Business Intelligence

Aztec Hydraulics avoided significant costs by utilizing SEI's dashboard capabilities with inexpensive hardware, rather than subscribing to third-party kiosk software. Televisions in each department now display real-time metrics and dashboards without recurring license fees.

Key Metrics & ROI

- 200% increase in online sales, driven by real-time product visibility
- 25–30 minutes saved per day in Shopify updates—completely automated
- Hours of manual reporting eliminated monthly through automation
- No recurring dashboard software fees, saving hundreds annually
- Faster order fulfillment and increased warehouse efficiency

Sage

Sage Enterprise Intelligence – More than BI

SEI is a fully Cloud enabled Business Intelligence and Data Management solution that helps organizations make informed decisions based on real-time data. It empowers all users with a simple interface to access and analyze data in a self-sufficient manner and eliminates the need for disparate tools and specialized skills.

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